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FACT FILE

Market Research Division
Fairchild Publications, New York

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Women's Coats, Suits, Rainwear and Furs

FAIRCHILD FACT FILE

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WOMEN'S COATS, SUITS & RAINWEAR

Market Trends

Preliminary 1980 production figures from the U.S. Bureau of the Census indicate a 10.4% increase in women's, misses' and juniors' coat production compared to 1979. This increase follows an 8% decline in cuttings in 1979 compared to 1978. According to the same source, suit production fell 16.4% in 1980 from the previous year.

Imports remain a problem for the domestic coat, suit and rainwear industry. In 1980, imports of these items rose 25.9% in units to approximately 41.1 million, and their value was up 18.5%. This rise, coupled with decreased U.S. production in prior years, has allowed coat, suit and rainwear imports to approach the 50% penetration level.

The U.S. export picture continued to improve in 1980, although it is still small compared to imports. Women's and children's coats, suits, jackets and rainwear exports increased 26.7% in value and 89.5% in quantity over 1979.

U.S. coat manufacturers plan to stimulate consumer interest by offering a diversified product line for fall 1981. According to Women's Wear Daily (May 12, 1981), their new lines offer a variety of choices, such as lined raincoats, pile coats, short coats, polyester-filled coats and down-filled coats. Down coats are now viewed by manufacturers as just one category among many after being an outstanding sales performer last year. They express the hope that designer wool coats will fulfill its early promise as the new sales leader. Prior to their introduction, coats were one of the few apparel areas with little designer representation.

The continued increase in the number of working women, especially professional women, offers the best potential market for coats, suits and rainwear. A study by the Celanese Corp. estimated working women had $23.2 billion worth of apparel purchasing power in 1979.

Women's suit sales have been soft at retail. Women seem more inclined to purchase less expensive separates and blouses to stretch their apparel dollars. Good quality traditional suits which will last through several seasons are selling best.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures compiled by the U.S. Census Bureau covers the latest available information on the women's, misses' and juniors' suit and coat industry and the waterproof outergarments industry at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years between the complete census of manufactures conducted every five years. It is adjusted for comparability with the latest census report (1977).

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Value of shipments and miscellaneous receipts of manufacturers classified in the women's suit and coat industry reached $2.97 billion in 1978, a 2% increase over 1977. Value by manufacturers classified in the waterproof outergarments industry rose 7.1% in the same period to $373.7 million. (This figure includes garments for men, women and children, as well as miscellaneous receipts.)

Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	1,557	1,548	--
Number of establishments, total**	na	1,672	1,618	--
Number with 20 or more employees	na	1,067	1,023	--
Employees, total (thous.)	81.4	84.7	75.9	- 3.9%
Production workers (thous.)	67.8	72.7	64.9	- 6.7
Payroll (mil. $)	$ 689.2	$ 654.0	$ 446.7	+ 5.4
Value added by manufacture# (mil. $)	1,459.2	1,429.6	839.8	+ 2.1
Value of shipments## (mil. $)	2,972.3	2,912.9	1,805.3	+ 2.0
Capital expenditures, new (mil. $)	21.9	22.0	16.4	- 0.5

Waterproof Outer Garments (SIC 2385*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	155	236	--
Number of establishments, total**	na	167	257	--
Number with 20 or more employees	na	105	164	--
Employees, total (thous.)	12.0	12.0	15.4	--
Production workers (thous.)	10.4	10.1	13.2	+ 3.0%
Payroll (mil. $)	$ 91.5	$ 89.4	$ 86.4	+ 2.3
Value added by manufacture# (mil. $)	191.9	194.4	168.8	- 1.3
Value of shipments## (mil. $)	373.7	348.8	332.1	+ 7.1
Capital expenditures, new (mil. $)	1.6	5.6	2.4	-71.4

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2337 comprises establishments primarily engaged in manufacturing women's, misses' and juniors' suits, coats, pantsuits and skirts, except fur and leather coats and raincoats. (Apparel made in knitting mills is not included.)

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outergarments made from such materials as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children. It does not include vulcanized rubber garments.

**Each business location is counted as a separate establishment.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of shipments of specified garments by all producers, including manufacturers classified in other industries, is shown on page 10.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1972
Annual Survey of Manufactures, 1978.

Concentration in the Industry

In 1977, plants classified in the women's and misses' suit and coat industry with fewer than 50 employees accounted for 67.7% of all plants, but only 29.8% of total industry shipments. Plants with 100 or more employees, 12.8% of the total, shipped 48.5% of total industry output.

Manufacturing Establishments in the Women's & Misses' Suit & Coat Industry & in the Waterproof Outergarment Industry by Employment Class Size, 1977

Industry	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. $	% of Total
Women's & misses' coats & suits (SIC 2337*), total	1,672	100.0%	84.7	100.0%	$2,912.9	100.0%
By Establishment size:						
Under 20 employees	605	36.2	4.7	5.5	247.8	8.5
20-49 employees	527	31.5	17.3	20.4	621.8	21.3
50-99 employees	326	19.5	22.3	26.3	631.7	21.7
100 or more employees	214	12.8	40.5	47.8	1,411.5	48.5
Waterproof outergarments (SIC 2385*), total	167	100.0%	12.0	100.0%	$ 348.8	100.0%
By Establishment size:						
Under 20 employees	62	37.1	0.5	4.2	15.8	4.5
20-99 employees	70	41.9	2.9	24.2	104.6	30.0
100-249 employees	25	15.0	4.0	33.3	104.5	30.0
250 or more employees	10	6.0	4.6	38.3	123.9	35.5

*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments in Large Plants, 1980

	No. of Plants With 20+ Employees	No. of Plants With 100+ Employees	Total Shipments (Mil.$)	% of Shipments From Plants With 100+ Employees
Women's, misses' & juniors' suits & coats (SIC 2337*)	521	151	$3,683.6	62%
Waterproof outergarments (SIC 2385*)	114	46	464.4	79

*For a definition of these SIC codes, see page 2.

Source: Sales & Marketing Management, Survey of Industrial Purchasing Power 1981, (All rights reserved.)

Employment & Earnings

Total employment in the suit and coat industry fell 3.2% to 63.1 thousand in 1980 from 65.2 thousand in 1979. The number of production workers in the industry also declined, but at a slower rate than overall employment. The average of 54.8 thousand production workers employed in 1980 was 2.5% below the 1979 level of 56.2 thousand. However, average weekly earnings of production workers increased 12.5% in 1980 to $170.00, compared to $151.06 in 1979.

Employment & Earnings in the Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*), 1979, 1980

	1980	1979	% Change 1980/1979
All employees (thous.)	63.1	65.2	- 3.2%
Production workers (thous.)	54.8	56.2	- 2.5
Average weekly earnings	$170.00	$151.06	+12.5
Average hourly earnings	5.00	4.55	+ 9.9
Average weekly hours	34.0	33.2	+ 2.4

*For a definition of this SIC code, see page 2.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings, March 1980, 1981.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Selected Business Ratios in the Suit & Coat Industry & in the Waterproof Outergarment Industry, 1979
(Median Results)

	Women's, Misses' & Juniors' Suits & Coats (SIC 2337*)	Waterproof Outergarments (SIC 2385*)
Number of firms reporting	232	28
Current assets to current debt (times)	1.72	2.01
Net profits on net sales (percent)	2.22	0.71
Net sales to inventory (times)	7.9	8.5
Net sales to net working capital (times)	8.52	5.33
Average collection period (days)	40	50

*For a definition of these SIC codes, see page 2.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
(All rights reserved.)

Location

New York State had the biggest concentration of the women's coat and suit industry, accounting for 38.7% of the plants and 34.7% of industry shipments in 1977. California, which has become increasingly important in the women's wear industry in recent years, accounted for 11.5% of shipments with 13% of the plants.

A third of the shipments of the waterproof outergarment industry came out of Maryland in 1977 and that state had only 6.6% of the plants.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location

Leading States in the Women's Suit & Coat Industry & in the Waterproof Outergarment Industry, 1977

	Establishments (plants)		Employees (thous.)	Value of Shipments (Mil.$)
	No.	With 20+ Employees		
Women's, misses' & juniors' suits & coats (SIC 2337*), total	1,672	1,067	84.7	$2,912.9
New England Division:				
Massachusetts	99	71	6.3	312.9
Connecticut	33	25	2.2	95.3
Middle Atlantic Division:				
New York	648	349	20.8	1,001.4
New Jersey	260	199	12.4	261.2
Pennsylvania	72	60	5.3	163.3
East North Central Division:				
Ohio	10	9	(D)	(D)
Illinois	30	21	1.9	40.4
West North Central Division:				
Minnesota	13	9	0.8	31.8
Missouri	21	16	2.2	70.2
South Atlantic Division:				
Maryland	11	6	1.0	11.6
North Carolina	19	14	1.9	28.2
South Carolina	18	15	1.6	95.5
Georgia	15	12	1.1	21.1
Florida	47	26	2.5	46.3
East South Central Division:				
Tennessee	16	12	2.2	65.4
Alabama	11	11	1.8	21.4
West South Central Division:				
Texas	55	37	4.2	141.7
Pacific Division:				
Washington	12	7	0.5	9.5
California	218	119	8.6	336.1
Waterproof outergarments (SIC 2385*), total	167	105	12.0	$ 348.8
New England Division:				
Massachusetts	14	10	0.8	13.7
Middle Atlantic Division:				
New York	62	37	1.9	80.5
New Jersey	18	14	1.0	20.1
Pennsylvania	5	3	0.2	2.5
South Atlantic Division:				
Maryland	11	10	3.3	116.3
Georgia	10	8	0.9	22.3
East South Central Division:				
Alabama	3	3	0.5	7.0
Pacific Division:				
California	5	2	(D)	(D)

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

Location

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual firms.
*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

Reports on a monthly industry survey conducted by the Census Bureau covering a sample of manufacturers indicate that production of women's coats totaled 19,199,000 units in 1980, which was 10.4% above the 1979 total. Cuttings of suits totaled 21,140,000 in 1980, according to preliminary data, which was 16.4% below the 1979 total.

The seasonal pattern in cuttings, based on the monthly Census Bureau reports, was as follows:

Cuttings of Women's, Misses' & Juniors' Suits & Coats by Months, 1979, 1980

Suits (incl. pantsuits)	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1980(p)	100.0%	8.4%	9.7%	10.4%	8.6%	6.6%	7.0%	7.2%	9.3%	11.2%	9.2%	6.6%	5.8%
1979	100.0	8.5	9.6	10.5	8.6	8.8	8.7	7.3	8.8	8.1	8.7	6.8	5.6
Coats													
1980(p)	100.0	5.9	6.9	6.8	7.5	8.9	9.4	8.5	11.5	10.2	10.0	8.3	6.1
1979	100.0	6.3	5.7	7.0	7.9	9.1	9.6	8.7	12.0	9.8	9.9	8.7	5.1

(p) = preliminary

Source: Based on U.S. Bureau of the Census
Current Industrial Reports (monthly)
M23H(81) Women's, Misses' & Juniors' Apparel.

The annual Current Industrial Report summary for 1979 showed production of coats for women down 8.0% compared with 1978, while output of suits dropped 21.2%. The annual reports in this series include information on cuttings by price line and by fabric construction, as noted in the following table.

(continued)

PRODUCTION

By Fabric/Price

Production of Women's, Misses' & Juniors' Suits & Coats
By Wholesale (Factory) Price, Fabric & Construction, 1977-1979
(Thousands of Units)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' suits	25,275	32,089	36,487	-21.2%
Pantsuits	15,872	20,614	23,570	-23.0
By construction:				
Woven fabric	7,318	8,881	na	-17.6
Knit fabric	5,705	8,468	na	-32.6
Construction, n.s.k.	2,849	3,265	na	-12.7
By fabric:				
All cotton & chiefly cotton	567	1,578	na	-64.1
All man-made & chiefly man-made	12,223	15,675	na	-22.0
All wool & chiefly wool	448	451	na	- 0.7
All other fabric / Fabric, n.s.k.	2,634	40 / 2,870	na / na	- 9.5
Suits, except pantsuits	9,403	11,475	12,917	-18.1
By price (per unit):				
Under $16.00	769	956	1,304	-19.6
$16.00 to $38.99	6,075	7,695	7,695	-21.0
$39.00 & over	2,060	2,693	2,298	-23.5
Price line, n.s.k.	499	131	1,620	+280.9
By construction:				
Woven fabric	2,177	3,419	3,478	-36.3
Knit fabric	6,798	7,813	7,902	-13.0
Construction, n.s.k.	428	243	1,537	+76.1
By fabric:				
All cotton & chiefly cotton	386	667	477	-42.1
All man-made & chiefly man-made	7,999	9,486	9,805	-15.7
All wool & chiefly wool	950	1,119	496	-15.1
All other fabric / Fabric, n.s.k.	68	76 / 127	-- / 2,139	-66.5
Women's, misses' & juniors' coats, except fur, all leather & rain	17,394	18,911	18,956	- 8.0
By price (per unit):				
Under $16.00	306	634	1,845	-51.7
$16.00 to $38.99	8,287	9,293	10,480	-10.8
$39.00 to $75.99	5,469	5,905	4,259	- 7.4
$76.00 & over	1,649	1,531	884	+ 7.7
Price line, n.s.k.	1,683	1,548	1,488	+ 8.7
By construction:				
Woven fabric	15,791	16,494	16,294	- 4.3
Knit fabric	949	1,409	1,773	-32.6
By fabric:				
All cotton & chiefly cotton	461	411	253	+12.2
All man-made & chiefly man-made	7,697	8,880	10,327	-13.3
All wool & chiefly wool	7,872	8,369	6,166	- 5.9

(continued)

PRODUCTION

By Fabric/Price

Production of Women's, Misses' & Juniors' Suits & Coats
By Wholesale (Factory) Price, Fabric & Construction, 1977-1979
(Thousands of Units)
(continued)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' coats, except fur, all leather & rain (continued)				
By fabric (cont'd):				
All other fabric	107	186	--	-42.5%
Fabric, n.s.k.	1,234	1,065	2,210	+15.9

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
MA-23A-(79)-1 Apparel.

Production of Women's, Misses' & Juniors' Raincoats by Fabric, 1977-1979
(Thousands of Units)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' raincoats, total	5,497	5,750	6,363	- 4.4%
Plastic (with & without fabric trim)	4	3	na	+33.3
Rubberized and/or coated fabric	81	177	na	-54.2
Uncoated fabric:				
All cotton & chiefly cotton	671	645	na	+ 4.0
All man-made & chiefly man-made	4,170	4,400	na	- 5.2
All other fabric	442	383	na	+15.4
Construction, n.s.k.	129	142	na	- 9.1

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
MA-23A-(79)-1 Apparel.

Additional information on women's suit, coat and rainwear production is available from the National Cotton Council's Cotton Counts Its Customers. This source covers some items not included in the Census Bureau reports.

Production of Women's, Misses' & Juniors' Suits, Coats & Rainwear, 1977-1979
(Thousands of Units)

	Production		
	1979(p)	1978(r)	1977(r)
Women's, misses' & juniors':			
Coats & jackets, excl. leather	38,448	38,652	39,876
Coats	18,816	19,404	18,960
Knit, incl. fake fur	1,224	1,356	1,860
Woven	17,592	18,048	17,100
Jackets	19,632	19,248	20,916
Knit, incl. fake fur	9,024	9,204	10,248
Woven	10,608	10,044	10,668
Suits & pantsuits	33,408	32,844	36,492
Dress suits, incl. uniform	12,048	11,700	12,924
Knit	8,556	8,304	8,964
Woven	3,492	3,396	3,960
Pantsuits & jumpsuits	21,360	21,144	23,568
Knit	10,464	10,356	11,316
Woven	10,896	10,788	12,252
Rainwear, excl. plastic & rubberized	5,748	5,640	6,168
Knit	684	732	684
Woven	5,064	4,908	5,484

(p) = preliminary
(r) = revised

Source: National Cotton Council of America, Cotton Counts Its Customers, 1980 Edition.

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Women's Suit & Coat Industry & in the Waterproof Outergarment Industry, 1977

	Delivered Cost (Mil. $)
Women's & misses' suit & coat industry (SIC 2337*), total	$ 939.5
Broadwoven fabrics	412.7
Purchased knitted fabrics	182.5
All other materials, containers & supplies, including n.s.k.	344.3
Waterproof outergarment industry (SIC 2385*), total	105.2
Broadwoven fabrics	51.6
Purchased knitted fabrics	3.3
All other materials, containers & supplies, including n.s.k.	50.3

n.s.k. = not specified by kind
*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

SHIPMENTS

A preliminary estimate for the year 1980 on the value of shipments of women's suits and coats by all U.S. producers, issued by the Bureau of Industrial Economics, U.S. Census Bureau (U.S. Industrial Outlook 1981), indicated an increase of over 8% compared with the 1979 total, and a gain of 16.5% compared with 1978.

Industry estimates based on a sample survey covering shipments in 1979, issued by the Census Bureau in the Current Industrial Reports (which are not directly comparable to the broader-based 1977 census of manufactures or annual survey of manufactures data) are reported below. Coats and raincoats have fared better than suits.

Trends in Value of Shipments of Women's Coats, Suits & Raincoats, 1979/1978

	1979 (Mil.$)	% Change 1979/1978
Women's, misses, juniors'		
Coats, excluding fur, all-leather	$694.8	+ 4.5%
Suits, excluding pantsuits	256.5	-22.1
Pantsuits	238.6	-26.7
Raincoats	173.3	+ 8.2

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A (79)-1.

SHIPMENTS

The most comprehensive figures on shipments are covered in the complete census of manufactures, compiled by the Census Bureau at five-year intervals, in years ending in "2" and "7." In interim years, the Census Bureau issues reports in an annual survey of manufactures which is based on a sample of manufacturing firms. The data obtained from the sample are adjusted by the Census Bureau for comparability with the complete census, and available findings for 1978 and 1977 are covered in the following table, as well as for 1972.

Value of Shipments of Women's Suits & Coats by All Producers, 1972, 1977, 1978

	Quantity (thous.)		Value (Mil.$)			% Change
	1977	1972	1978	1977	1972	1978/1977
Women's, misses' & juniors' coats & capes (except all-fur, leather)	19,040	23,508	$634.7	$612.1	$570.1	+ 3.7%
Suits:	36,527	22,871	nr	762.4	409.9	--
Made in cut-&-sew shops	36,315	17,207	555.9	665.3	313.2	-16.4
Made in knitting mills	212	5,664	nr	97.0	96.7	--
Coats & suits, type not specified	nr	nr	226.1	285.9	115.9	-20.9
Contract work on women's, misses' & juniors' suits, coats & skirts	--	--	425.7	423.9	282.7	+ 0.4

nr - not reported

Source: U.S. Bureau of the Census, Census of Manufactures, 1972, 1977; Annual Survey of Manufactures, 1978.

By Leading State

Based on the total value of shipments of women's coats and suits by all manufacturers, by state, reported in the complete census of manufactures, New York State, while maintaining its leadership has been losing ground. In the coat industry, New Jersey registered the sharpest gain in value of shipments from 1972 to 1977; Pennsylvania in the case of women's suits.

(continued)

SHIPMENTS

By Leading State

Value of Shipments of Women's Coats & Suits by All Producers
By Leading States, 1977, 1972

	Value of Shipments (Mil. $) 1977	1972	% Change 1977/1972
Women's, misses' & juniors' coats & capes			
United States, total	$ 612.1	$ 570.1	+ 7.4%
New England Division:			
Connecticut	11.0	nr	--
Middle Atlantic Division:			
New York	333.4	355.1	- 6.1
New Jersey	60.1	18.0	+233.9
Pennsylvania	6.9	1.6	+50.0
East North Central Division:			
Illinois	17.4	nr	--
West North Central Division:			
Minnesota	18.8	nr	--
Missouri	38.8	28.2	+37.6
Pacific Division:			
Washington	2.4	nr	--
California	61.2	50.4	+21.4
Women's, misses' & juniors' suits			
United States, total	665.3	313.2	+112.4
New England Division:			
Massachusetts	15.9	12.9	+23.3
Middle Atlantic Division:			
New York	208.6	130.8	+59.5
New Jersey	12.4	15.5	-20.0
Pennsylvania	43.4	1.6	+2,612.5
East North Central Division:			
Illinois	6.2	7.9	-21.5
West North Central Division:			
Missouri	11.3	6.2	+82.3
South Atlantic Division:			
North Carolina	7.5	nr	--
Florida	29.2	7.0	+317.1
West South Central Division:			
Texas	80.4	nr	--
Pacific Division:			
California	100.0	52.1	+91.9
Contract work on women's, misses' & juniors' suits, coats & skirts			
United States, total	423.9	282.7	+49.9
New England Division:			
Massachusetts	45.5	18.7	+143.3
Connecticut	6.7	6.9	- 2.9

(continued)

SHIPMENTS

By Leading State

Value of Shipments of Women's Coats & Suits by All Producers
By Leading States, 1977, 1972 (continued)

	Value of Shipments (Mil. $) 1977	1972	% Change 1977/1972
Contract work on women's, misses' & juniors' suits, coats & skirts (continued)			
Middle Atlantic Division:			
New York	$ 88.1	$ 95.3	- 7.5%
New Jersey	85.9	63.0	+36.3
Pennsylvania	29.5	17.7	+66.7
East North Central Division:			
Illinois	13.4	5.2	+157.7
West North Central Division:			
Missouri	3.4	2.2	+54.5
South Atlantic Division:			
Maryland	8.6	nr	--
Virginia	5.7	nr	--
North Carolina	7.8	nr	--
South Carolina	6.8	5.8	+17.2
Georgia	4.8	2.4	+100.0
Florida	12.1	8.2	+47.6
East South Central Division:			
Tennessee	9.1	1.4	+550.0
West South Central Division:			
Arkansas	9.4	nr	--
Texas	11.9	nr	--
Pacific Division:			
Washington	6.1	nr	--
California	33.2	20.1	+65.2

nr = not reported.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-23B.

PRODUCER PRICES

Producer (Factory) Price Indexes for Specified
Women's Apparel Categories, 1979, 1980
(1967 = 100 unless otherwise indicated)

	Annual Averages 1980	1979	% Change 1980/1979
All apparel	172.2	160.4	+ 7.4%
Women's apparel	150.3	140.3	+ 7.1
Pantsuits, incl. jumpsuits (12/77=100)	na	107.5	na
Untrimmed coats & capes	135.9	138.0	- 1.5

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The import value of women's and children's coats and raincoats reached $438.3 million in 1980, 18.5% above the 1979 value. The quantity imported rose 25.9% to 3.4 million dozen. Coats of man-made fibers, the largest import classification in the coat and raincoat category, increased 30.7% in value and 28.1% in import quantity in 1980 compared to 1979. Cotton coats, other than those coats 3/4 length or longer, imported into the U.S. showed the largest rise in both value and quantity of any of the reported coat categories, 86.7% and 79.3%, respectively.

Far Eastern countries dominated the list of leading countries of origin for imported coats and raincoats, with one exception. Uruguay was the biggest exporter of wool coats (not knit) to the U.S. and accounted for 26.1% of the import value of these coats and 29.9% of the quantity.

FOREIGN TRADE

Imports

Imports of Women's, Girls' & Infants' Coats & Raincoats By Leading Country of Origin, 1979, 1980

	Quantity (Thous. Doz.)			Value CIF* (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Women's, girls' & infants' coats & raincoats, total	3,425.6	2,720.3	+ 25.9%	$438,278	$369,928	+ 18.5%
Coats, wool, not knit	151.6	134.6	+ 12.6	41,720	41,490	+ 0.5
Uruguay	45.4	51.2		10,905	13,762	
Japan	33.9	19.2		6,808	4,026	
Hong Kong	17.9	20.6		4,359	4,555	
Coats, cotton, 3/4 length or longer, not knit	237.3	364.7	- 34.9	46,655	76,107	- 38.7
Hong Kong	69.1	97.8		14,602	21,874	
Taiwan	26.4	38.4		6,398	9,205	
Korea	22.6	37.2		4,314	8,336	
Cotton, n.s.p.f., not knit	1,096.3	611.3	+ 79.3	144,429	77,367	+ 86.7
Hong Kong	212.9	118.2		32,982	18,627	
Japan	173.0	124.6		32,041	19,642	
People's Republic of China	172.5	51.5		17,683	4,248	
Man-made fibers, n.s.p.f., not knit	1,755.1	1,369.9	+ 28.1	167,243	127,991	+ 30.7
Korea	525.9	298.7		57,512	34,031	
Taiwan	439.6	287.1		43,515	29,124	
Hong Kong	269.2	266.3		30,151	29,305	
Wool, knit	38.0	24.9	+ 52.6	12,346	9,647	+ 28.0
Hong Kong	26.6	12.1		5,842	2,382	
Federal Republic of Germany	3.1	6.6		1,895	3,718	

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

n.s.p.f. = not specially provided for

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135 December 1979, 1980.

FOREIGN TRADE

Exports

While still a small part of overall production, U.S. exports of women's, girls' and infants' coats, suits and raincoats are growing rapidly. In 1980, exports of these items were valued at $26.0 million, a 26.7% increase from 1979. The quantity of exports jumped 89.5% during the same period.

Women's coats, suits and raincoats exported to other countries, primarily in Central America, rose 56.0% in value and 90.4% in units compared with 1979. Women's, girls' and infants' suits gained 39.7% in export quantity but fell 14.7% in value, with Central American countries the primary market for these goods. Much of the loss in export value was accounted for by the 41.3% drop in the value of suits made of man-made fibers. This loss occurred despite a 52.9% increase in the export quantity of these suits.

Exports of Women's, Girls' & Infants' Coats, Suits & Rainwear, 1979, 1980

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Women's, girls' & infants' coats, suits & raincoats, total	423.1	223.3	+ 89.5%	$26,019	$20,538	+ 26.7%
Women's coats, jackets & raincoats, total	194.9	102.4	+ 90.4	15,259	9,780	+ 56.0
Not knit						
Wool	32.9	10.1	+225.7	2,955	973	+203.7
Cotton	11.7	7.4	+ 58.1	1,151	565	+103.7
Man-made fibers	64.5	47.7	+ 35.2	6,697	5,411	+ 23.8
Knit						
Wool	2.1	1.8	+ 16.7	217	220	- 1.4
Cotton	14.0	9.3	+ 50.5	1,019	645	+ 58.0
Man-made fibers	23.7	13.5	+ 75.6	2,156	1,161	+ 85.7
All other textile materials	46.0	12.5	+268.0	1,064	805	+ 32.2
Women's, girls' & infants' coats, jackets & raincoats, not knit, of textile materials not mentioned above	79.3	14.3	+454.5	3,694	2,475	+ 49.2
Women's, girls' & infants' suits, total	148.9	106.6	+ 39.7	7,066	8,283	- 14.7
Not knit						
Wool	2.3	1.8	+ 27.8	116	104	+ 11.5
Cotton	9.2	9.1	+ 1.1	817	611	+ 33.7
Man-made fibers	97.4	63.7	+ 52.9	3,295	5,616	- 41.3
All other textile materials	1.4	0.7	+100.0	174	217	- 19.8
Knit						
Wool	7.0	1.8	+288.9	252	85	+196.5
Cotton	6.1	14.6	- 58.2	330	666	- 50.4
Man-made fibers	23.2	12.8	+ 81.2	1,819	792	+129.7
All other textile materials	2.1	2.1	--	263	192	+ 37.0

(footnotes continued)

Exports (continued)

Exports of Women's, Girls' & Infants' Coats, Suits & Rainwear, 1979, 1980
(continued)

*This value represents the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and any other charges or transportation cost beyond the port of operation.

Source: U.S. Department of Commerce,
FT 410, U.S. General Exports,
December 1979, 1980.

WOMEN'S SUITS, COATS & RAINWEAR AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Female Population of the U.S., 1980 & Projections to 2000*
(In Thousands)

	1980	1985	2000	% Change 2000/1980	Percent of Female Population 1980	1985	2000
Total, all ages	116,472	119,514	133,790	+ 14.9%	100.0%	100.0%	100.0%
Under 15 years	25,069	25,203	27,785	+ 10.8	21.5	21.1	20.8
15 years & older	91,403	94,311	106,005	+ 16.0	78.5	78.9	79.2
15-19 years	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2
20-24 years	10,652	10,192	8,360	- 21.5	9.1	8.5	6.2
25-34 years	18,698	20,034	17,326	- 7.3	16.1	16.8	12.9
35-44 years	13,063	16,002	21,084	+ 61.4	11.2	13.4	15.8
45-54 years	11,789	11,542	18,356	+ 55.7	10.1	9.7	13.7
55-64 years	11,549	11,390	12,116	+ 4.9	9.9	9.5	9.1
65 years & older	15,242	16,293	19,103	+ 25.3	13.1	13.6	14.3
Median age (in years)	31.3	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
1980 Census of Population
Supplementary Reports
PC80-S1-1;
Current Population Reports,
Series P-25, No. 714 (July 1977).

(continued)

THE POTENTIAL MARKET

According to the Census Bureau, the number of women in the U.S. aged 15 and over will grow 16.0% by the year 2000. Women aged 35-44 will increase 61.4% by 2000 to more than 21 million, or 19.9% of females 15 and older. The next largest increase is in the 45-54 year old age group, which is expected to rise 55.7% to 18.3 million women. During the same time span, women aged 15-34 are expected to decline in numbers, with the biggest decrease (-21.5%) in the 20-24 year old age bracket.

Working Women

The number of working women in the U.S. expanded throughout the 70's. Nearly 12 million more women were in the labor force in 1979 than in 1970. These women accounted for about 60% of the total gain in the labor force during the decade. Women aged 25 to 34 were responsible for almost half of the increase in the number of female workers in that ten-year period.

By 1980, there were a total of 44.6 million working women in the U.S., approximately 52% of the female population aged 16 and over. The labor force participation rates (those women who are working or looking for a job), for selected age groups, can be found in the following table.

Labor Force Participation Rates of Women By Age, 1979, 1980
(Annual Averages)

	1980	1979
Total, 16 years and over	51.6%	51.0%
By Age Group:		
16 & 17 years	43.8	45.8
18 & 19 years	53.1	62.9
20-24 years	69.0	69.1
25-34 years	65.4	63.8
35-44 years	65.5	63.6
45-54 years	59.9	58.4
55-64 years	41.5	41.9
65 years & older	8.1	8.3

Source: U.S. Bureau of Labor Statistics.

A study on working women released by the Celanese Fibers Marketing Company in January 1980 placed the apparel purchasing power of working women at $23.2 billion, or approximately $525 per woman. Professional women, 23% of all working women according to the Celanese survey, held $8.6 billion of this purchasing power.

This large market for women's wear—and especially such items as dresses, coats, suits, and blazers—has prompted many department and specialty stores to open departments specially designed to appeal to the working woman and her need for quick efficient shopping, personalized service and wardrobe advice. According to a survey of these shops by Women's Wear Daily (December 3, 1980), they have shown steady increases in sales since their inception.

For a more detailed look at working women, see the Fairchild Fact Files: Consumer Market Developments and Market Pacesetters (Young Adults).

CONSUMER PRICES

Consumer Price Indexes for Specified Women's Apparel Categories, 1979, 1980
(1977 = 100)

	Annual Averages		% Change
	1980	1979	1980/1979
Women's apparel	103.1	101.3	+ 1.8%
Coats & jackets	164.2	167.2	- 1.8
Suits	90.9	92.3	- 1.5

Source: U.S. Bureau of Labor Statistics.

RETAIL SALES BY STORE TYPE

The only official information available on sales of women's coats and suits in specified types of retail outlets is contained in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports and not all store types were required to break down their sales by merchandise category. Due to a change in the classification system, comparative figures for earlier census years are not available.

Dressy & Tailored Coats & Suits

Women's ready-to-wear stores accounted for almost half of reported sales of women's dressy and tailored coats and suits in 1977. Department store sales of $550.2 million represented 34.1% of the total which, as defined by the Census Bureau, excludes pantsuits and rainwear.

Reported Sales of Women's Coats & Suits by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's coats & suits	33,099	100.0%	$1,615.7	100.0%
Department stores**	5,787	17.5	550.2	34.1
Women's ready-to-wear stores***	17,334	52.4	800.1	49.5
Family clothing stores	5,702	17.2	156.2	9.7
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,276	12.9	265.4	16.4

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

***Does not include sales in women's accessory and specialty stores (including furriers). Sales of women's and girls' wear in these stores totaled $858.9 million in 4,962 stores with payrolls.

Source: Based on U.S. Bureau of the Census Census of Retail Trade, 1977, Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Casual Coats, Jackets & Rainwear

In 1977, sales of casual coats, jackets and rainwear were reported at $1.56 billion in the leading store types. Women's ready-to-wear stores reported sales of $681.1 million, 43.5% of the total.

Reported Sales of Women's Casual Coats, Jackets & Rainwear
By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's casual coats, jackets & rainwear	39,449	100.0%	$1,565.9	100.0%
Department stores**	6,940	17.6	608.8	38.9
Women's ready-to-wear stores***	18,640	47.2	681.1	43.5
Family clothing stores	9,256	23.5	201.9	12.9
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,613	11.7	74.1	4.7

(See footnotes on previous table)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Percent of Total Women's & Children's Wear Sales Accounted for by
Women's Coats & Suits in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% of Sales Accounted For By:	
		Dressy & Tailored Coats & Suits	Casual Coats, Jackets & Rainwear
Department stores	$16,250.7	3.4%	3.7%
Women's ready-to-wear stores**	11,066.5	7.2	6.1
Family clothing stores	3,471.6	4.5	5.8

*Excludes footwear sales.
**Excludes sales in women's accessory and specialty stores.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Department Stores

In 1977, there were 79 firms with annual department store sales of $100 million or more operating 7,311 establishments with combined sales of $70.6 billion, 91.9% of total department store sales.

Sales Concentration in Department Stores, 1977

	Firms		Stores		Sales	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores	600	100.0%	8,807	100.0%	$76,909.4	100.0%
$100 million or over	79	13.2	7,311	83.0	70,605.2	91.9
$ 50 mil. - 99.9 mil.	32	5.3	453	5.1	2,268.4	2.9
$ 5 mil. - 49.9 mil.	201	33.5	729	8.3	3,340.3	4.3
$ 1 mil. - 4.9 mil.	253	42.2	279	3.2	667.2	0.9
Under $1 million	35	5.8	35	0.4	28.3	*

* Less than 0.05%

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, Establishment & Firm Size RC77-S-1.

Total Department Store Sales, 1978-1980
(Millions of Dollars)

	1980(r)	1979(r)	1978(r)	% Change 1980/1979	% Change 1980/1978
Total sales	$94,185	$88,520	$81,494	+ 6.4%	+15.6%

(r) = revised.

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-80S.

Percent of Department Store Sales of Women's & Misses' Coats & Suits, by Months

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Coats	100.0%	10.4%	7.1%	10.1%	8.2%	4.0%	2.3%	3.2%	7.3%	8.8%	12.2%	13.2%	13.2%
Suits	100.0	6.7	8.5	13.7	12.1	7.0	4.5	4.7	7.0	10.3	10.1	7.0	8.4

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data, (1961-1965) latest available.

RETAIL SALES BY STORE TYPE

Operating Ratios

Median sales of women's, misses' and juniors' suits in department stores with total sales over $1 million improved 18.3% in 1979 compared to 1978, according to a survey by the National Retail Merchants Association. Over the same period, sales of all female apparel increased a typical 7.0%. Women's, misses' and juniors' jackets, casual and all-weather coats also did better, rising 10.3%, typically, over 1978. Dressy and tailored coat sales were up only 2.5% in 1979.

Merchandising & Operating Results in Women's Coat & Suit Departments, 1979
(Median Results for Department Stores With Sales Over $1 Million)

		Women's, Misses' & Juniors'		
	Adult Female Apparel (147*)	Dressy & Tailored Coats (101*)	Jackets, Casual & All-Weather Coats (64*)	Suits (41*)
Net sales, % change from last year	+ 7.0%	+ 2.5%	+ 10.3%	+ 18.3%
Net sales, % of merchandise division	100.0	3.5	1.9	0.5
Net sales, % of total store sales	36.7	1.3	0.7	0.2
$ sales per square foot of selling space (main or largest unit)	$107.4	$114.0	$134.0	$ 64.0
Cumulative markon, %	50.2%	49.8%	49.5%	49.9%
Gross margin, % of net sales (including cash discounts)	43.6	43.7	46.4	39.9
Markdowns, retail, % of net sales	18.2	18.7	13.7	24.9
Number of stock turns (times)	4.0	3.3	3.9	3.3
Salespeople's salaries, % of sales (main or largest selling unit)	7.2	7.1	7.1	6.8
Sales promotion, % of net sales	3.1	3.1	3.7	3.4

*Number represents the number of reporting stores in each category.

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

Women's Ready-To-Wear Stores

Large firms, with annual sales of $1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of $8.0 billion, or 64.6% of total sales in all stores of this type. Firms with annual sales under $500,000 represented 91.9% of the total number of firms but had only 26.7% of total sales.

(continued)

Women's Ready-To-Wear Stores (continued)

Sales Concentration in Women's Ready-To-Wear Stores, 1977

	Firms		Stores		Sales	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Women's ready-to-wear stores	31,612	100.0%	44,894	100.0%	$12,442.6	100.0%
$10 million or more	111	0.3	7,442	16.6	5,223.5	42.0
$ 1 mil. - 9.9 mil.	1,167	3.7	4,816	10.7	2,817.2	22.6
$500,000 - 999,999	1,540	4.9	2,606	5.8	1,078.7	8.7
Under $500,000	28,794	91.1	30,030	66.9	3,324.2	26.7

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, Establishment & Firm Size RC77-S-1.

Women's Ready-To-Wear Store Sales, 1978-1980
(Millions of Dollars)

				% Change	
	1980(r)	1979(r)	1978(r)	1980/ 1979	1980/ 1978
Total sales	$15,646	$14,969	$14,297	+ 4.5%	+ 9.4%

(r) = revised.

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-80-S.

Operating Ratios

Women's, misses' and juniors' suit sales jumped a typical 32.1% in 1979 over 1978 suit sales in specialty stores with sales over $1 million. This was far above the median 6.9% sales increase for all female apparel in specialty stores reported by the National Retail Merchants Association. The two other coat classifications reported by this source—dressy & tailored coats and jackets, casual & all-weather coats—had sales increases lower than the median for all female apparel.

(continued)

RETAIL SALES BY STORE TYPE

Operating Ratios

Merchandising & Operating Results in Women's Coat & Suit Departments, 1979
(Median Results for Specialty Stores With Sales Over $1 Million)

	Adult Female Apparel (51*)	Women's, Misses' & Juniors' Dressy & Tailored Coats (26*)	Jackets, Casual & All-Weather Coats (12*)	Suits (12*)
Net sales, % change from last year	+ 6.9%	+ 3.3%	+ 6.3%	+ 32.1%
Net sales, % of merchandise division	100.0	5.3	3.2	1.6
Net sales, % of total store sales	64.2	3.6	1.8	1.1
$ sales per square foot of selling space (main or largest unit)	$145.1	$154.0	na	na
Cumulative markon, %	50.9%	49.5%	49.6%	50.8%
Gross margin, % of net sales (including cash discounts)	42.2	45.1	45.9	42.1
Markdowns, retail, % of net sales	21.9	20.0	12.1	22.8
Number of stock turns (times)	3.9	3.8	4.0	4.5
Salespeople's salaries, % of sales (main or largest selling unit)	7.1	na	na	na
Sales promotion, % of net sales	2.3	na	na	na

*Number represents the number of reporting stores in each category.
na = not available

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

RETAIL ADVERTISING

Seasonality in Retailers' Newspapers Advertising Linage
On Women's & Misses' Coats & Jackets, 1978, 1979

Coats & Jackets	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1979	7.1%	7.6%	6.9%	4.0%	2.8%	3.1%	4.3%	8.9%	11.4%	14.4%	17.5%	12.0%
1978	8.0	8.1	8.3	4.4	3.0	3.0	5.7	8.7	8.5	13.4	16.2	12.7

Source: Advertising Checking Bureau, George Neustadt, Inc., covering retail newspaper linage in seven cities.

Working Women

A study released in January 1980 by the Celanese Fibers Marketing Company classified working women into eight subgroups according to job profile. Two types of professional women were profiled. One group, known as the formal professional, consists of accountants, lawyers, sales managers, executives and administrators. The second group, the informal professional, is composed of teachers, artists, engineers, advertising and medical personnel, computer science technicians and other similar occupations.

In addition to identifying these groups, the study sought to gain information on their apparel purchasing attitudes via focus groups held among a cross section of women across the U.S. Among their findings, the study reported that the formal professional purchases apparel for occupational status, conformity to a dress code and for physical attractiveness. They prefer classic clothes, with a touch of contemporary styling, of good quality. Better department and specialty stores are their most frequent shopping outlets.

The informal professional woman buys clothes for their practicality as functional work apparel, as well as for occupational status and the physical attractiveness of the garments. While these women also shop in better department stores, moderate to better specialty stores and national chains are two other popular store types for their apparel purchases. The clothing they buy must be attractive but functional. Informal professional women tend to buy a variety of styles, according to the study, with quality an important criterion.

The following information on women's coats, suits and rainwear has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "singles"—with their own households—are not included. The data includes purchases for women aged 17 and older.)

Women's Suits

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	26.3	26.9
National chains	10.6	6.5
Discount stores, including K mart	10.8	7.1
Specialty stores	41.0	60.0
All other stores/no answer	11.2	8.4

(continued)

CONSUMER BUYING HABITS

Women's Suits

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $20	25.6	7.2
$20 - 39.99	30.7	18.3
$40 - 69.99	23.4	26.4
$70 - 99.99	10.6	18.5
$100 & over	9.6	29.6

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	7.5%	10.3%	7.6%	13.6%	6.4%	5.9%	5.3%	8.5%	7.8%	10.3%	6.4%	10.3%	100.0%
Dollars	6.5	9.4	8.0	12.8	5.2	5.1	4.0	8.1	9.3	13.7	7.2	10.7	100.0

Source for above tables: NPD Research.

Women's Fur, Fur-like & Pile Coats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	29.6	30.4
National chains	26.5	16.1
Discount stores, incl. K mart	8.5	3.9
Specialty stores	25.8	25.1
All other stores/no answer	9.6	24.4

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $30	16.8	3.9
$30 - 59.99	35.6	18.0
$60 - 99.99	24.7	20.1
$100 - 139.99	9.9	12.9
$140 & over	13.0	45.2

(continued)

Women's Fur, Fur-like & Pile Coats (continued)

Percent of Purchases by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	12.0%	9.5%	2.4%	1.2%	0.4%	--	4.3%	3.4%	12.8%	11.0%	19.5%	23.4%	100.0%
Dollars	9.7	9.0	2.4	0.4	0.1	--	2.4	2.1	7.3	9.7	31.5	25.3	100.0

Source for above tables: NPD Research

Women's All Weather Coats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	35.6	42.9
National chains	18.7	13.9
Discount stores, incl. K mart	12.4	7.7
Specialty stores	27.1	30.4
All other stores/no answer	6.2	5.1

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $30	24.0	10.4
$30 - 49.99	30.6	23.0
$50 - $69.99	21.6	24.2
$70 - $99.99	16.6	25.7
$100 & over	7.1	16.7

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	8.5%	7.5%	15.2%	10.1%	6.9%	2.0%	4.8%	6.1%	5.5%	8.6%	12.4%	12.3%	100.0%
Dollars	9.7	9.8	14.8	8.3	5.1	1.4	3.7	6.0	6.5	7.5	13.0	14.3	100.0

Source for above tables: NPD Research.

CONSUMER BUYING HABITS

Women's Raincoats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	28.4	37.4
National chains	16.2	12.0
Discount stores, incl. K mart	19.3	8.3
Specialty stores	29.1	34.5
All other stores/no answer	7.0	7.8

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $20	38.1	10.4
$20 - 39.99	33.7	31.6
$40 - 69.99	18.9	31.5
$70 - 99.99	5.8	14.3
$100 & over	3.5	12.1

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	4.6%	7.4%	15.7%	9.0%	7.9%	7.8%	9.1%	11.7%	4.5%	10.6%	4.7%	7.0%	100.0%
Dollars	5.0	7.9	19.2	9.4	7.8	7.2	6.4	9.7	3.3	11.6	5.9	6.7	100.0

Source for above tables: NPD Research.

FURS

Market Trends

Despite the uneven state of the U.S. economy, consumers continue to purchase furs. Retail sales of furs continued the steady sales climb which began in the early 1970's. In 1980, sales reached $944 million, up from $858.4 million in 1979 and a more than two-fold increase over 1971 sales of $293.4 million.

The typical fur customer comes from the higher income groups which are least affected by poor economic conditions. The potential fur market has expanded in recent years, along with the large increase in the number of working women during the 1970's. Continued growth is foreseen in the 1980's as well, with the number of professional women rising at a faster rate than overall female employment. These professional women constitute a big part of the fur market. The rise in the number of two-income families also provides the fur industry with potential new customers, both male and female.

Currently, the men's fur segment is estimated at 10 to 15% of total fur sales. According to Daily News Record (March 20, 1980), detailing of the fur and the type of fur used are the most important considerations in the design of a man's fur coat. Traditionally, racoon and coyote have been the most popular furs for men, and reversible furs are also gaining popularity because of their practicality. In styling, straight cigarette shapes and V-shapes are preferred by males over styles that flair from the waist.

The fur customer is purchasing furs at a younger age than in the past. Formerly, much of the market's sales were to women over 50. Now, however, furs are viewed as fashion items and retailers report brisk sales to men and women in their 20's and 30's.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The latest detailed information on the fur industry is contained in the 1978 Annual Survey of Manufactures. The data has been adjusted for comparability with the 1977 census.

Shipments by manufacturers classified in the fur goods industry exceeded $404 million in 1978, 5.4% higher than 1977 shipments. The value added by manufacture in 1978 was $116.1 million, a 16.1% increase.

GENERAL STATISTICS ON THE INDUSTRY

Fur Goods (SIC 2371*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	620	796	--
Number of establishments, total**	na	620	797	--
Number with 20 or more employees	na	48	48	--
Employees, total (thous.)	3.9	4.0	4.7	- 2.5%
Production workers (thous.)	3.1	3.2	4.0	- 3.1
Payroll (mil. $)	$ 51.6	$ 51.5	$ 41.2	+ 0.2
Value added by manufacture# (mil. $)	116.1	112.8	86.2	+ 2.9
Value of shipments## (mil. $)	404.1	383.4	220.0	+ 5.4
Capital expenditures, new (mil. $)	0.8	0.5	1.1	+60.0

na = not available

*SIC 2371 includes establishments primarily engaged in manufacturing fur coats and other garments, accessories, and trimmings made of fur. The industry includes producers of fur caps, coat linings, glove linings and other fur apparel, such as capes, coats, hats, jackets and neckpieces. Establishments primarily engaged in manufacturing sheep-lined clothing are classified in Industry 2386, and those engaged in dyeing and dressing of furs in Industry 3999.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in the industries. The value of shipments of fur goods only, by all producers, including manufacturers making them as secondary products, is covered on page 32.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977,
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Fur Goods Manufacturing Establishments by Employment Size, 1977

	Establishments		Value of Shipments	
	No.	% of Total	Mil. $	% of Total
Fur goods (SIC 2371*), total	620	100.0%	$383.4	100.0%
By Establishment Size:				
Under 5 employees	401	64.7	56.1	14.6
5-9 employees	104	16.8	65.9	17.2
10-49 employees	104	16.8	195.1	50.9
50 or more employees	11	1.8	66.3	17.3

*For a definition of this SIC number, see page 30.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

Employment & Share of Shipments in Large Plants, 1980

	No. of Plants		Total	% of Shipments
	With 20+ Employees	With 100+ Employees	Shipments (Mil. $)	From Plants With 100+ Employees
Fur goods (SIC 2371*)	117	6	$436.8	16%

*For a definition of this SIC code, see page 30.

Source: Sales & Marketing Management Magazine, Survey of Industrial Purchasing Power 1981, (All rights reserved.)

Manufacturers' Operating Ratios

Selected Business Ratios in the Fur Goods Industry, 1979
(Median Results)

	1979
Number of firms reporting	76
Current assets to current debt (times)	1.54
Net profits on net sales (percent)	1.42
Net sales to inventory (times)	7.9
Net sales to net working capital (times)	8.95
Average collection period (days)	36

Source: Dun & Bradstreet, Inc. Business Economics Division, (All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York State accounted for 85.6% of all manufacturing establishments engaged in the fur goods industry in 1977. This was down from New York's 97% of all establishments as reported in the 1972 Census of Manufactures. Despite this drop, shipments from New York plants totaled 91.0% of the total value of industry shipments in 1977.

The Fur Goods Industry by Region, 1977

	Establishments		Value of Shipments	
	Total	20 or more Employees	Millions of $	% of Total
Fur goods, U.S. total	620	48	$383.4	100.0%
Middle Atlantic region:				
New York	531	40	349.0	91.0
All other states	89	8	34.4	9.0

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series MC77-1-23.

SHIPMENTS

The total value of shipments of furs for men and for women reported by U.S. manufacturers reached close to $385 million in 1978, the latest year available. This was 7.4% higher than the 1977 total.

Value of Shipments of Fur Goods by All U.S. Producers, 1977, 1978
(Millions of Dollars)

	Value of Shipments			% Change	% Change
	1978	1977	1972	1978/1977	1978/1972
Fur goods, total	$384.9	$358.5	$213.6	+7.4%	+80.2%

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, 1972, Annual Survey of Manufactures, 1978, M78(AS)-2.

FOREIGN TRADE

Imports

Imports of fur apparel and other fur articles were valued at close to $89 million in 1980 (CIF), according to the Department of Commerce.

Hong Kong replaced Korea as the leading country of origin. The value of imports from Hong Kong rose 17.7%, and represented almost a third of the reported 1980 total. Imports from Korea gained less than 7% compared with 1979 and represented 29.9% of the total. Imports from Canada were valued at $11.5 million, or 12.9% of total imports.

(continued)

Imports (continued)

Imports of Fur Clothing & Articles by Leading Country of Origin, 1979, 1980

	Value CIF* (Thous. $)		
	1980	1979	% Change 1980/1979
Fur clothing & articles	$88,839	$82,554	+ 7.6%
Hong Kong	29,263	24,867	+17.7
Korea	26,603	24,915	+ 6.8
Canada	11,456	10,954	+ 4.6

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Department of Commerce, U.S. General Imports FT 135, December 1979, 1980.

In 1980, the value of imported fur skins was $143.8 million (CIF), down 20.7% from the 1979 import value. Mink fur skins (except Japanese mink) declined 17.9% in value.

U.S. Imports of Fur Skins, 1979, 1980

	Quantity (Thous. Units)			Value (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Fur skins, whole, raw or undressed, total	na	na	---	$143,791	$181,446	- 20.7%
Mink, excl. Japanese mink	2,567.8	3,083.2	- 16.7%	82,507	100,475	- 17.9
Persian lamb & caracul	74.5	73.8	+ 0.9	1,403	1,011	+ 38.8
Beaver	89.1	59.3	+ 50.2	2,887	1,951	+ 48.0
Fox, excl. silver, black or platinum	306.9	269.7	+ 13.8	19,309	27,919	- 30.8
Hare	1,412.3	2,088.1	- 32.4	1,142	1,339	- 14.7
Ocelot	1.6	nr	--	57	nr	--
Otter	18.2	0.5	+3,540.0	268	49	+446.9
Rabbit (quantity in thous. lbs.)	4,552.2	4,928.6	- 7.6	8,882	10,641	- 16.5
Sable	112.8	142.5	- 20.8	8,661	11,431	- 24.2
Fur skins, whole, raw or undressed, n.s.p.f.	18.3	26.2	- 30.1	18,675	26,630	- 29.9

na = not available
nr = not reported
n.s.p.f. = not specially provided for
* For a definition of the CIF value, see preceding table.

Source: U.S. Department of Commerce, U.S. General Imports FT 135, December 1979, 1980.

FOREIGN TRADE

Exports

Exports of wearing apparel and articles made of fur skins rose 33.2% in 1980 to $83.1 million compared to $62.4 million in 1979. Wearing apparel and articles made of mink were valued at $42.7 million, 23.5% above the 1979 export value. Wearing apparel and articles made from fur skins, other than mink, rose at an even faster rate of 45.2% to $40.4 million.

The Federal Republic of Germany (West Germany) was the primary recipient of U.S. produced furs. Almost 32% of the total value of reported fur exports went to this country. Switzerland imported 22.5% of the total export value. Japan was the third leading country of importation.

Exports of Fur Apparel & Articles by Leading Country of Importation, 1979, 1980

	Value (Thous. $)		% Change
	1980	1979	1980/1979
Wearing apparel & articles, n.s.p.f., of fur skins, total	$83,105	$62,405	+ 33.2%
Wearing apparel & articles, n.s.p.f., of mink fur skins	42,702	34,586	+ 23.5
Federal Republic of Germany	11,717	11,890	- 1.5
Switzerland	10,203	6,515	+ 56.6
Japan	8,728	5,652	+ 54.4
Wearing apparel & articles, n.s.p.f., of fur skins, other than mink	40,403	27,819	+ 45.2
Federal Republic of Germany	14,672	8,299	+ 76.8
Switzerland	8,511	6,154	+ 38.3
Japan	2,293	5,036	- 54.5

n.s.p.f. = not specially provided for
*This value represents the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and any other charges or transportation cost beyond the port of exportation.

Source: U.S. Department of Commerce, U.S. General Exports FT 410, December 1979, 1980.

RETAIL SALES BY STORE TYPE

According to the latest official source, the 1977 Census of Retail Trade compiled by the U.S. Census Bureau, the number of furriers and fur shops declined 6.5% from 1972 to 1977, but sales were up 62%. Most of the volume reflects women's fur sales, although sales of men's furs have gained sharply in the past two years.

RETAIL SALES BY STORE TYPE

Furriers & Fur Shops, 1972, 1977

Number		Sales (Thous. $)	
1977	1972	1977	1972
1,887	2,018	$322,345	$199,478

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, 1972.

In the merchandise line sales reports, issued in the 1977 census of retail trade, a total of $364.6 million in retail sales of women's furs and fur garments was reported. Women's ready-to-wear stores accounted for over 47% of this total, department stores, 45.2%.

Reported Sales of Women's Furs & Fur Garments
By Store Type (Not Including Furriers), 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's furs & fur garments	8,486	100.0%	$364.6	100.0%
Department stores**	3,231	38.1	164.6	45.2
Women's ready-to-wear stores	4,352	51.3	171.7	47.1
Family clothing stores	857	10.1	27.8	7.6
Children's wear stores	46	0.5	0.5	0.1

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data.

Source: Based on U.S. Bureau of the Census Census of Retail Trade, 1977, Merchandise Line Sales PC 77-L.

(continued)

RETAIL SALES BY STORE TYPE

Percent of Total Women's & Children's Wear Sales
Accounted for by Women's Furs & Fur Garments Sales
In Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% of Total Accounted for by Women's Furs & Fur Garments
Department stores	$16,250.7	1.0%
Women's ready-to-wear stores**	11,066.5	1.5
Family clothing stores	3,471.6	0.8

*Excludes footwear sales.
**Excludes sales of women's accessory and specialty stores.

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales RC 77-L.

Department Stores

Fur department sales in department stores with sales over $1 million dropped a median 0.6% in 1979, according to the National Retail Merchants Association. Sales in all upstairs women's apparel departments in these stores rose a median 7.0% in comparison. However, sales per square foot of selling space did out perform the typical upstairs department, $152.8 versus $107.4. The number of stock turns in the fur department was, at 1.4 times, considerably lower than the 4.0 times in other female apparel departments in these department stores.

Merchandising & Operating Results of Fur Departments, 1979
(Median Results for Department Stores With Sales Over $1 Million)

	Adult Female Apparel (147*)	Furs & Fur Garments (44*)
Net sales, % change from last year	+ 7.0%	- 0.6%
Net sales, % of merchandise division	100.0	0.8
Net sales, % of total store sales	36.7	0.3
$ sales per square foot of selling space (main or largest selling unit)	$107.4	$152.8
Cumulative markon, %	50.2%	42.5%
Gross margin, % of net sales (including cash discounts)	43.6	38.8
Markdowns, retail, % of net sales	18.2	17.2
Number of stock turns (times)	4.0	1.4
Salespeople's salaries, % of sales (main or largest selling unit)	7.2	7.1
Sales promotion, % of net sales	3.1	3.7

*Number represents the number of reporting stores in each category.

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

RETAIL SALES BY STORE TYPE

Department Stores

Percent of Department Store Sales of Women's Furs
By Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Furs	100.0%	8.4%	6.0%	6.1%	6.1%	4.3%	2.4%	4.1%	9.0%	7.9%	12.4%	13.1%	20.2%

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data (1961-1965)-latest available.

RETAIL ADVERTISING

Seasonality in Retailers' Newspaper Advertising Linage
On Women's Furs & Fur Garments, 1978, 1979

Furs & Fur Garments	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1979	10.4%	8.4%	6.2%	4.3%	2.5%	1.6%	4.9%	10.2%	9.8%	11.1%	17.0%	13.6%
1978	12.6	9.6	7.9	4.5	3.3	1.8	6.3	9.0	7.3	8.5	13.9	15.3

Source: Advertising Checking Bureau, George Neustadt, Inc., covering retail newspaper linage in seven cities.

(For Consumer Buying Habit information on furs, see page 26.)

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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